



proposal

APPRAISAL AND REAL ESTATE CONSULTING

Solicitation #SCC050003-A3

Submitted by:

Robert Helmandollar

General Real Estate Appraiser, Arizona #30403

Real Estate Broker, Arizona #SE5040205000



Arizona Licensed Brokerage (C0536756000)

08.23.05



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August 23, 2005

Arizona Department of Transportation
1739 West Jackson Street, Suite A
Mail Drop 100P
Phoenix, AZ 85007

ATTN: Connie Ickes and Selection Committee

**RE: Proposal – Appraisal Services and Real Estate Consulting
Solicitation #SCC050003-A3**

Dear Ms. Ickes and Selection Committee:

Consultant Engineering, Inc. (CEI) is pleased to have the opportunity to submit our proposal for Land Appraisal Services for the Arizona Department of Transportation (ADOT). We have been following this contract for sometime and are prepared to provide the necessary resources to the State of Arizona in accordance with the Scope of Work outlined in the Request for Proposal (RFP). We understand this contract will be utilized not only by ADOT but by the Arizona Department of Administration (ADOA) and various state agencies, counties and local governments. As outlined in the RFP's Scope of Work, CEI is interested in the following work and have outlined our proposal in response to the following Categories:

**Category 1 — Real Property Appraisal Services
Category 3 — Appraiser Reviewer Services**

CEI is very experienced in completing appraisal services for Arizona local agencies. We are fully capable of performing the work and committing the necessary staff and resources throughout the duration of this contract. **CEI is an Arizona licensed Real Estate Brokerage firm** and have staff appraisers that are certified as well.

This project requires a comprehensive Lead Appraiser and Project Manager who is very familiar with the way the State of Arizona conducts appraisals for purchase of property. CEI offers **Mr. Bob Helmandollar** as the **Lead Appraiser** for this contract. He is licensed in the State of Arizona as a General Real Estate Appraiser and Real Estate Broker.

Mr. Helmandollar was with ADOT for 25 years in the Right of Way Group. He started in 1969 as a Staff Appraiser and progressed to various appraisal positions to his final role as Chief Right of Way Agent (retired in 1994). Over the past 11 years, Bob has maintained active in the real estate industry. He left Arizona to work on appraisal, acquisition and relocation projects in Kentucky, Missouri, Arkansas and Washington. Bob returned to Arizona to head up CEI's Right of Way Group in 2004. Over this period of time, Bob has helped CEI's Right of Way group grow to service clients such as ADOT and local government and private agencies around the State with professional real estate consulting services.

While Mr. Helmandollar was with ADOT, he was part of the management team that set the precedent for right of way policies and procedures that are still in place today. During the 1980's and 1990's, Bob was an integral player in the appraisal and acquisition of ADOT right of way during the State's "boom" in transportation planning and highway infrastructure development.

As Lead Appraiser on this contract, Bob will be responsible for signing all appraisals for Category 1, and be the Reviewer for Category 3. He will be the State's main point of contact for this contract. As outlined in the RFP's Special Terms and Conditions, we will submit qualifications of key personnel to be added to

the contract should additional staff be required. Once approved, these personnel will be able to perform under this contract.

Initially, as a key personnel approval, we offer the qualifications of Mr. Reggie Rector to assist Mr. Helmandollar in the appraisal workload. Reggie is Arizona Certified Residential Real Estate Appraiser and an Arizona Real Estate Broker. He has been involved in right of way appraisals, as well as acquisition and relocation, in the sale of real property in Arizona over the past 20 years. He has been with CEI for 5 years and has worked with Mr. Helmandollar on current and recent property appraisals. A resume of Mr. Rector is included in our Proposal.

Portions of our proposal, such as the Offer, the Questionnaire and Price Sheet have been submitted on-line on the SPIRIT website, including the necessary attachments. For the reviewers' convenience, we have included a copy of these forms, along with our response to the "Required Information – Section 5.7."

CEI appreciates the opportunity provided by this proposal and are ready for the challenges of this contract!

Sincerely,

Consultant Engineering, Inc.

A handwritten signature in blue ink that reads 'Bob Helmandollar'.

Robert Helmandollar
Lead Appraiser / Project Manager



APPRAISAL SERVICES AND REAL ESTATE CONSULTING

SOLICITATION #SCC050003-A3

1. Offer and Contract Award

See SPIRIT for on-line form – copy below.

Offer	
Solicitation # SCC050003-A4	
Supplier: Consultant Engineering, Inc.	
Page loaded on 08/15/2005 at 08:29:27 AM.	
Offer	?
TO THE STATE OF ARIZONA: The Undersigned hereby offers and agrees to furnish the material, service or construction in compliance with all terms, conditions, specifications and amendments in the Solicitation and any written exceptions in the offer. Signature also certifies Small Business status.	
Tax Information	
Arizona Transaction (Sales) Privilege Tax License No.	N/A
Federal Employer Identification No.	860821774
Location Information	
Company Name	Consultant Engineering, Inc.
Address:	3404 W. Cheryl Dr., Ste. A-255 Phoenix, AZ 85051
Clarification Information	
Name:	John C. Patterson, PE
Phone:	(602) 866-5090
Fax:	(602) 866-5085
Electronic Signature	
Name:	John Patterson
Title:	President
Date:	08/15/2005 08:29 AM
Certification	
Status: Accepted	
By Accepting below, the bidder certifies:	
1. The submission of the offer did not involve collusion or other anti-competitive practices.	
2. The bidder shall not discriminate against any employee or applicant for employment in violation of Federal Executive Order 11246, State Executive Order 75.5 or A.R.S. §§ 41-1461 through 1465.	
3. The bidder has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted offer. Failure to provide a valid signature affirming the stipulations required by this clause shall result in rejection of the offer. Signing the offer with a false statement shall void the offer, any resulting contract and may be subject to legal remedies provided by law.	
4. The bidder certifies that the above referenced organization <u>is</u> a small business with less than 100 employees or has gross revenues of \$4 million or less.	

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2. Solicitation Amendments

Amendment(s) Acknowledged on SPIRIT.

Consultant Engineering, Inc. acknowledges Amendment No. 4



APPRAISAL SERVICES AND REAL ESTATE CONSULTING

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3. Price Sheet

See SPIRIT for on-line attachment – copy below.

DESCRIPTION

UNIT PRICE

~~Line 1 Real Estate Consulting (Category 4)~~ \$_____ per hour

Line 2 Category (ALL) Expert Witness

\$110.00 per hour

7.2.1.1.3 All costs, including travel, postage, telephone, printing, document copies, etc., shall be incorporated in the proposed hourly rate.

The Offeror may propose services in any category and may be awarded a contract to be placed in the specified pool(s). Appraisers shall have the required certification in the services they propose to provide.

Indicate below the category(s) in which the offeror is proposing:

7.2.3.2	CATEGORY	DESCRIPTION	YES	NO
	1	Real Property Appraisal Services	✓	
	2	Personal Property Appraisal Services		✓
	3	Appraisal Reviewer	✓	
	4	Real Estate Consultant		✓

Proposal Price Sheet Solicitation # SCC050003-A4									
Price Sheet									
Please enter hourly wages for each line item. Please see attached price sheet.									
Solicitation Type: RFP		Tabulation Grouping:		By Line Items					
LI #	Cm Code # Cm Code Item #	Commodity Code Description Commodity Code Item Description	Manufacturer	Pricing	Qty	%	Unit Price	Ext Price	
1	0918-0089 0918-0089-0099	Real Estate/Land Consulting (Including Land Survey Consulting Generic		FP	1		\$0.00	\$0.00	
2	0946-0015 0946-0015-0099	Appraisal Services, Real Estate Real and Personal.		FP	1		\$110.00	\$110.00	
								Total: \$ 110.00	



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4. Certification Requirements

See Copies of Appraisers' Certificates and Licenses below and in Section 8 – Resumes.

Consultant Engineering, Inc. – Arizona Licensed Real Estate Broker (C0536756000)



Bob Helmandollar – Chief Appraiser – General Real Estate Appraiser, (Arizona #30403)





5. References

See SPIRIT for on-line attachment – copy below.

PLEASE LIST THE NAME, ADDRESS, CONTACT NAME, AND TELEPHONE NUMBER FOR THREE (3) ORGANIZATIONS FOR WHOM YOU HAVE PROVIDED SIMILAR SERVICES WITHIN THE PAST 24 MONTHS. These references **WILL** be checked, so please make sure all information is accurate and current.

ORGANIZATION: City of Yuma
ADDRESS: 155 West 14th Street
CITY/STATE/ZIP CODE: Yuma, AZ 85364
CONTACT: Mr. Ish Castro, Real Property Agent
TELEPHONE NUMBER: 928-373-4525
DATE SERVICE WAS INITIATED: 05-04 through 01/05
DESCRIPTION OF SERVICE PROVIDED: **City of Yuma 40th Street Sanitary Sewer Line Interceptor (Phases I & II).** CEI provided right of way services for the City of Yuma Public Works Department on a large sewer line project. CEI represented the client in negotiations and acquiring rights of entry, temporary easements, permanent easements and fee titles from private property owners for new sewer line installation and future roadway construction. CEI is also responsible for preparing documents, obtaining and notarizing signatures, obtaining releases of liens, opening escrows with title companies, and processing claims for payment. Mr. Helmandollar provided market analysis and valuation documents for 29 parcels for fee and easement acquisitions.

ORGANIZATION: City of Sedona Department of Public Works
ADDRESS: 102 Roadrunner Drive
CITY/STATE/ZIP CODE: Sedona, AZ 86336
CONTACT: Mr. Charles P. Mosley, PE
TELEPHONE NUMBER: 928-204-7132
DATE SERVICE WAS INITIATED: 06/04 through 07/04
DESCRIPTION OF SERVICE PROVIDED: **City of Sedona Appraisals.** In June 2004, CEI prepared appraisals on City of Sedona properties for a land exchange with the Arizona Water Company. The Arizona Water Company intended to purchase City-owned land adjacent to their well site for expansion. Mr. Helmandollar performed an appraisal on the City-owned property and the Arizona Water Company property by considering their physical characteristics, their highest and best use and trends affecting the values. In determining the most accurate values, Mr. Helmandollar performed a direct sales comparison from current market data. He also provided appraisals on 7 parcels for a sewer expansion project in 2005, valuing permanent easements.

ORGANIZATION: Williams Gateway Airport
ADDRESS: 5835 S. Sossaman Road
CITY/STATE/ZIP CODE: Mesa, AZ 85212
CONTACT: Mr. Mike Williams
TELEPHONE NUMBER: 480-988-7600
DATE SERVICE WAS INITIATED: 04/05 (on-call) Task 1 (below) 05/05 through 06/05
DESCRIPTION OF SERVICE PROVIDED: **Parcels APN 304-32-27E and 304-30-020D Ray Road.** Provide land appraisal services and report preparation for Parcels APN #304-30-37E and 304-30-020D. Appraisals to consist of 2 options: value of the property without the proposed Ray Road Extension and value of the property with the proposed Ray Road extension. CEI has a one-year on-call contract with WGA for one year with options to extend.



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6. Substitute W-9 Form

See SPIRIT for on-line attachment – copy below.

STATE OF ARIZONA SUBSTITUTE W-9 & VENDOR AUTHORIZATION FORM		
<small>DO NOT SEND TO IRS</small> <small>Vendor MUST Print or Type Information</small>		<small>DO NOT SEND TO IRS</small> <small>Vendor MUST Print or Type Information</small>
Taxpayer Identification Number (TIN) 86-0821774		TIN Type <input checked="" type="checkbox"/> Employer Identification Number (EIN) <input type="checkbox"/> Social Security Number (SSN)
Legal Name <small>Must match TIN above</small> Consultant Engineering, Inc.		State of Arizona HRIS EIN <small>State of Arizona Employees ONLY</small>
Entity Type Select one of the following <input checked="" type="checkbox"/> Corporation (NOT providing health care, medical or legal services) (5A) <input type="checkbox"/> Corporation (providing health care, medical or legal services) (5M) <input type="checkbox"/> Partnership, LLP (6T) <input type="checkbox"/> Individual/Sole Proprietor (6I) <input type="checkbox"/> The US or any of its political subdivisions or instrumentalities (2G) <input type="checkbox"/> A state, a possession of the US, or any of their political subdivisions or instrumentalities (4G) <input type="checkbox"/> Tax-exempt organization under IRC §501 (5C) <input type="checkbox"/> An international organization or any of its agencies or instrumentalities (5U) <input type="checkbox"/> State of Arizona employee (1E) <input type="checkbox"/> Other Non-Tax-Exempt Entity (5P)		
Minority Business Indicator Select one of the following <input type="checkbox"/> Small Business (01) <input type="checkbox"/> Small Business – African American (23) <input type="checkbox"/> Small Business – Asian (24) <input type="checkbox"/> Small Business – Hispanic (25) <input type="checkbox"/> Small Business – Native American (27) <input type="checkbox"/> Small Business – Other Minority (05) <input type="checkbox"/> Small, Woman Owned Business (06) <input type="checkbox"/> Small, Woman Owned Business – African American (29) <input type="checkbox"/> Small, Woman Owned Business – Asian (30) <input type="checkbox"/> Small, Woman Owned Business – Hispanic (31) <input type="checkbox"/> Small, Woman Owned Business – Native American (33) <input type="checkbox"/> Small, Woman Owned Business – Other Minority (11) <input type="checkbox"/> Woman Owned Business (03) <input type="checkbox"/> Woman Owned Business – African American (17) <input type="checkbox"/> Woman Owned Business – Asian (18) <input type="checkbox"/> Woman Owned Business – Hispanic (19) <input type="checkbox"/> Woman Owned Business – Native American (21) <input type="checkbox"/> Woman Owned Business – Other Minority (08) <input type="checkbox"/> Minority Owned Business – African American (17) <input type="checkbox"/> Minority Owned Business – Asian (32) <input checked="" type="checkbox"/> Minority Owned Business – Hispanic (74) <input type="checkbox"/> Minority Owned Business – Native American (15) <input type="checkbox"/> Minority Owned Business – Other Minority (02) <input type="checkbox"/> Non-Profit, IRC §501(c) (88) <input type="checkbox"/> Non-Small, Non-Minority or Non-Woman Owned Business (00)		
Main Address <small>Where tax information and general correspondence is to be mailed</small>		
DBA/Branch/Location Consultant Engineering, Inc.		
Address 3404 West Cheryl Drive, Suite A-255		
Address continued 		
City Phoenix	State AZ	Zip code 85051
Remit to Address <input checked="" type="checkbox"/> Same as Main		
DBA/Branch/Location 		
Address 		
Address continued 		
City 	State 	Zip code
Contact Information		
Name John C. Patterson, PE, President		
Phone # 602-866-5090		EXT
Fax 602-866-5085		
email jpatterson@cei-az.com		
Certification <small>Under Penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me) AND 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding AND 3. I am a U.S. person (including U.S. resident alien). Certification instructions: You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. <u>The Internal Revenue Service does not require your consent to any provision of this document other than the certification required to avoid backup.</u></small>		
Signature Title President Current Date 08-21-05		
STATE OF ARIZONA AGENCY USE ONLY VENDOR: DO NOT WRITE BELOW THIS LINE		
AGY 	Agency Authorization 	Print Name Date
STATE OF ARIZONA GAO USE ONLY VENDOR & STATE AGENCY: DO NOT WRITE BELOW THIS LINE		
<input type="checkbox"/> IRS TIN Matching	<input type="checkbox"/> Corporation Commission	<input type="checkbox"/> HRIS <input type="checkbox"/> Other
<input type="checkbox"/> Other 		
Vendor Number MC <input type="checkbox"/>	Processed by 	Date Processed

GAO-W-9 Revised 03/15/05



7. Pre-Qualification Questionnaire

See SPIRIT for on-line submittal – copy below.

Questionnaire

Solicitation # SCC050003-A4

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Questions

The completed questionnaire is intended to develop information relative to the offeror's experience, organization, and other pertinent and material facts to acquaint the State with the offeror's qualifications for performing the work of the type and magnitude that might be offered by bid.

- 1 List the major projects completed by the Offeror as a prime contractor. Include the largest projects completed for any public agency.

SEE PAGE 17 OF PROPOSAL FOR PROJECT DESCRIPTIONS.

Note: A company prepared list of projects may be attached in lieu of this section if it contains the above information and must clearly define prime from subcontractor projects

a. Years Completed

Description _____

b. Years Completed

Description _____

c. Years Completed

Description _____

d. Years Completed

Description _____

- 2 The Offeror may propose services in any or all of the following four (4) categories. However, Contractors shall not be approved to provide both appraisal and appraisal review services on the same project. Real Property Appraisers and Real Property Review Appraisers shall have the required certification in the services they propose to provide. Indicate the category(s) in which the Offeror is proposing:

1. Real Property Appraisal Services ☒

2. Personal Property Appraisal Services _____

3. Appraisal Review Services ☒

4. Real Estate Consulting Services _____

- 3 WHICH STATE AGENCY'S WILL YOU WANT TO WORK FOR?

ARIZONA STATE LAND DEPT ☒

ARIZONA STATE PARKS BOARD ☒

ARIZONA GAME AND FISH DEPT ☒

ARIZONA SCHOOL FACILITIES BOARD ☒

ARIZONA DEPARTMENT OF ADMINISTRATION ☒

ARIZONA DEPARTMENT OF TRANSPORTATION ☒

OTHER _____

- 4 Has any principal of the Offeror ever applied for qualification with the State under a different name?
Yes _____ No ☒ If yes, please give details:

- 5 How long has Offeror been doing business under the offeror business name?

9.5 Years

6. Is the Offeror licensed as a Certified General Real Estate Appraiser?

Robert L Helmandollar / License Number: **30403** State: **Arizona** Expiration: **August 31, 2006**

- 7 Has the Offeror, or any subsidiary or affiliate of the Offeror, ever been removed from the approved bidder list by any local, state, or federal agency?

Yes _____ No ☒

If yes, please give details: _____

- 8 What percentage of your practice is Residential, Commercial, Vacant Land and Right of Ways? Please indicate the percentage for each. **Right of Way – 100%**



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Questionnaire Solicitation # SCC050003-A4

- 9 Do you understand Before and After appraisal assignments? Indicate **Yes** or No.
- 10 Do you understand the concept of the Parcel of the Whole? Indicate **Yes** or No.
- 11 How many Before and After appraisal assignments have you completed? **300-400 (Bob Helmandollar – career estimate)**
- 12 How many subdivision analyses assignments have you completed? **2-3 (Bob Helmandollar – career estimate)**
- 13 Have you done any court testimony? Indicate **Yes** or No.
- 14 How often have you testified? 20-25 (**Bob Helmandollar – career estimate**)
- 15 When was the last time you testified? Within the last 1 - 6 months?; 6 - 12 months?; **12 - 24 months?**
- 16 Statement of Experience
List the appraisal and/or consulting service experience of the principal individuals of the offer: Note: List all officers/key individuals that are active in the management and operation of the firm. A company prepared resume of each office/key individuals may be attached in Lieu of this section. (SEE PROPOSAL SECTION 8 FOR RESUMES)
- a. Name: **Helmandollar, Robert L.**
Present Position: **Chief Appraiser, Vice President** Years: **36 Years Appraisal Experience**
- b. Name: **Patterson, John C.**
Present Position: **President, Co-Owner** Years: **21 Years Civil Engineering**
- 17 Indicate below the geographic areas (i.e. county(s) or portions thereof) in which Offeror will accept assignments.
Will accept assignments statewide: ✓
- Apache County____
Coconino County____
Cochise County____
Gila County____
Graham County____
Greenlee County____
LaPaz County____
Maricopa County(excluding metropolitan Phoenix area)____
Mohave County____
Navajo County____
Pima County (excluting metropolitan Tucson area)____
Pinal County____
Santa Cruz County____
Yavapai County____
Yuma County____
Metropolitan Phoenix area____
Metropolitan Tucson area____



8. Qualifications, Education and Experience

Company Overview

The Arizona Department of Transportation (ADOT) is requesting appraisal services to support their Districts Statewide. This contract will also be utilized by the Arizona Department of Administration (ADOA) in conjunction with Arizona State Agencies, Counties and local governments. These agencies will use this as a sole method to contract with Appraisers. The length of the contract is one year, with options to extend three additional years.



Consultant Engineering, Inc. (CEI) provides comprehensive appraisal services by providing our clients with right of way agents that have first hand knowledge of the growth and transportation issues affecting Arizona business owners and residents. We also have right of way technicians who are bi-lingual (English and Spanish) who can be available to communicate with Spanish-speaking residents. We have performed right of way services for public agencies throughout the State. CEI right of way agents not only research comparable parcels and improvements but also have the ability to recognize whether properties are truly comparable based on location, proximity to services and transportation, available utilities, etc.

CEI's Right of Way Group is led by our Chief Appraiser, **Robert Helmandollar**. Bob is a former ADOT Chief Right of Agent. He is a licensed Arizona General Appraiser and will be the main point of contact for this contract and will sign all appraisals.

CEI is an Arizona-licensed Real Estate Brokerage Firm (#C05367560000). CEI is interested in providing services for the following Categories:

Category 1 — Real Property Appraisal Services

Category 3 — Appraiser Reviewer Services

CEI was formed over nine years ago by its principals, John C. Patterson, PE, a former Arizona Department of Transportation (ADOT) Area Engineer and Steve Bruflat, PE, a former City of Phoenix Engineer, to specialize in providing engineering and right of way services to public works and local transportation agencies.

CEI provides the following right of way services:

- Appraisals
- Planning
- Acquisitions
- Relocation Assistance
- Easements
- ROW Survey & ROW Plans



APPRAISAL SERVICES AND REAL ESTATE CONSULTING

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Company Information

Company: Consultant Engineering, Inc.
Address: 3404 West Cheryl Drive, Suite A-255
Phoenix, AZ 85051

Phone: 602-886-5090
FAX: 602-886-5085
Web Site: www.cei-az.com

Lead Appraiser / Project Manager: Robert Helmandollar
Right of Way Department Manager
Phone: 602-288-5617
Mobile: 602-370-1430
E-mail: bhelmandollar@cei-az.com

Principal in Charge: John C. Patterson, PE
President
Phone: 602-288-5629
480-218-8499
Mobile: 602-319-5678
E-mail: jpatterson@cei-az.com

CEI Insurance Coverage:

CEI maintains insurance coverage that adheres to the requirements stated in the Request for Proposals. CEI will name the State of Arizona as an additional insured with respect to liability arising out of the activities performed by, or on behalf of CEI.

"Contractor shall indemnify, defend, save and hold harmless the State of Arizona, its departments, agencies, boards, commissions, universities and its officers, officials, agents, and employees (hereinafter referred to as 'Indemnitee') from and against any and all claims, actions, liabilities, damages, losses, or expenses (including court costs, attorneys' fees, and costs of claim processing, investigation and litigation) (hereinafter referred to as 'Claims') for bodily injury or personal injury (including death), or loss or damage to tangible or intangible property caused, or alleged to be caused, in whole or in part, by the negligent or willful acts or omissions of Contractor or any of its owners, officers, directors, agents, employees or subcontractors." (Insurance: Professional Services Contracts; Indemnification Clause – Special Terms and Conditions, Solicitation #SCC050003-A3)



APPRAISAL SERVICES AND REAL ESTATE CONSULTING

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ACORD CERTIFICATE OF LIABILITY INSURANCE		OP ID 124 CONSU-1	DATE (MM/DD/YYYY) 08/18/05
PRODUCER Stuckey Ins & Assoc Agencies P O Box 7020 Phoenix AZ 85011-7020 Phone: 602-264-5533 Fax: 602-279-9336		RECEIVED AUG 19 2005	
INSURED Consultant Engineering Inc P O Box 37167 Phoenix AZ 85069-7167		THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.	
		INSURERS AFFORDING COVERAGE	NAIC #
		INSURER A: St Paul Fire & Marine Ins Co	24767
		INSURER B: U S Fidelity and Guaranty Co	25887
		INSURER C: Zurich American Ins Co	16535
		INSURER D:	
		INSURER E:	

COVERAGES

THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. AGGREGATE LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR ADD'L LTR INSRD	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YYYY)	POLICY EXPIRATION DATE (MM/DD/YYYY)	LIMITS	
B X	GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Severability of <input checked="" type="checkbox"/> Contractual Lia GEN'L AGGREGATE LIMIT APPLIES PER <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC	BK01497679	07/01/05	07/01/06	EACH OCCURRENCE (DAMAGE TO RENTED PREMISES) (Ea accident) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMMERC AGG	\$ 1000000 \$ 500000 \$ 10000 \$ 1000000 \$ 2000000 \$ 2000000
B X	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NONOWNED AUTOS	BK01497679	07/01/05	07/01/06	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	\$ 1000000 \$ \$ \$
	GARAGE LIABILITY <input type="checkbox"/> ANY AUTO				AUTO ONLY - EA ACCIDENT OTHER THAN AUTO ONLY: EA ACC AGG	\$ \$ \$
B	EXCESS/UMBRELLA LIABILITY <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> DEDUCTIBLE <input checked="" type="checkbox"/> RETENTION \$0	BK01497679	07/01/05	07/01/06	EACH OCCURRENCE AGGREGATE	\$ 5000000 \$ 5000000 \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/ANNUITY EXCLUDED? If yes, describe under SPECIAL PROVISIONS below				WC STATUS: TORY LIMITS E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	\$ \$ \$ \$
C	Prof Liability	EOC9209501 00	07/01/05	07/01/06	2000000 per claim	2000000 aggregate

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES / EXCLUSIONS ADDED BY ENDORSEMENT / SPECIAL PROVISIONS

Professional Liability - Claims Made - Retro Date 7-1-96/The State of Arizona and ADOT, its departments, agencies, boards, commissions, universities and its officers, officials, agents, and employees are additional insured with respect to General Liability and Auto only. Coverage is primary and non-contributory *Except 10 days for non-payment of premium

CERTIFICATE HOLDER

ARIZD10
 State of Arizona
 Arizona Dept of Transportation
 Connie Ickes
 1739 W Jackson St M/D 100P
 Phoenix AZ 85007-3276

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER WILL ENDEAVOR TO MAIL, 30* DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER, ITS AGENTS OR REPRESENTATIVES.

AUTHORIZED REPRESENTATIVE

Larry Stuckey

ACORD 25 (2001/08)

© ACORD CORPORATION 1



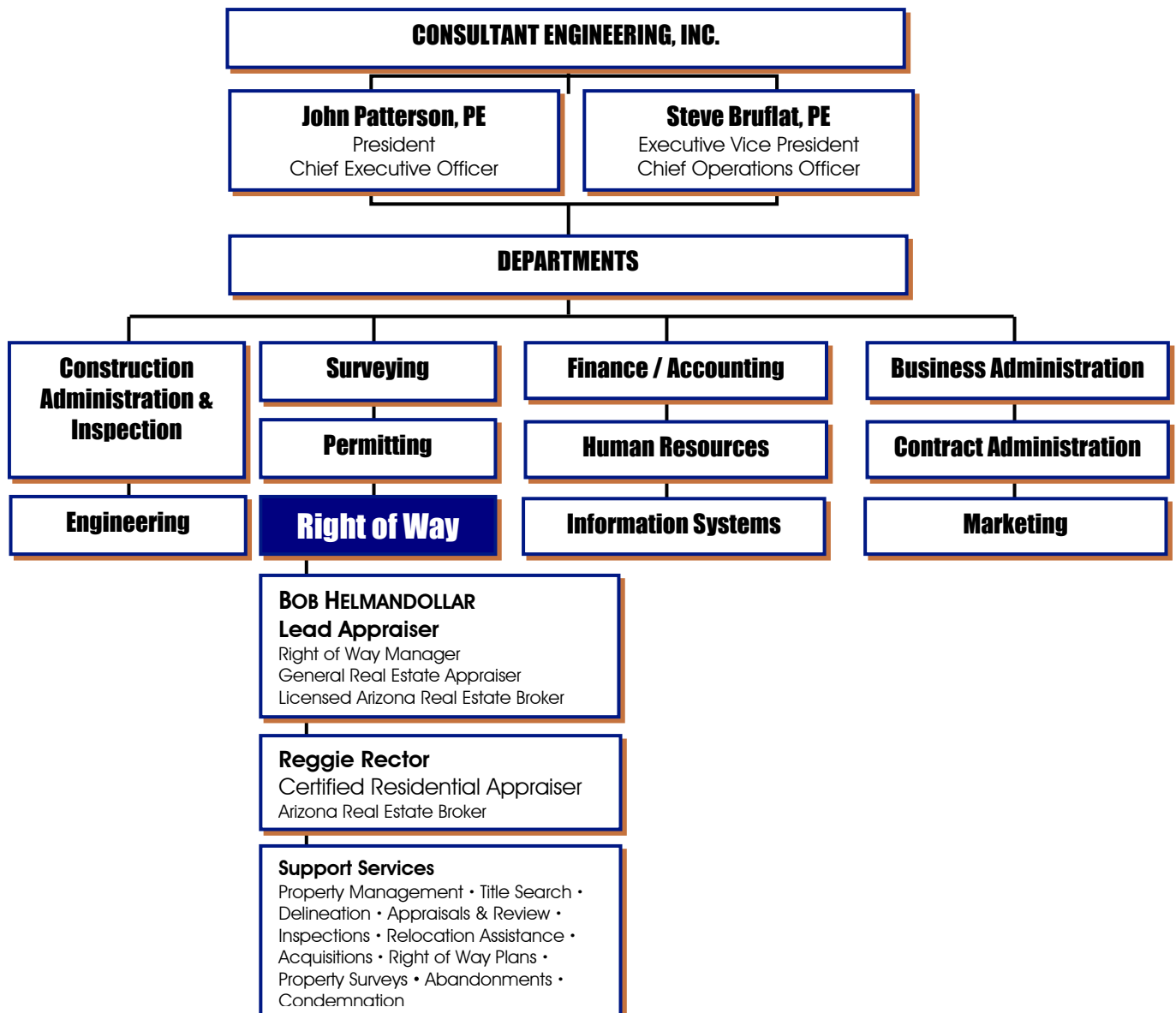
APPRAISAL SERVICES AND REAL ESTATE CONSULTING

SOLICITATION #SCC050003-A3

Offeror's and Team Organization

CEI offers a full range of professional consulting services in addition to right of way. Each department is led by a professional with many years of experience in that area of expertise. The qualifications and experience of our Lead Appraiser, Bob Helmandollar, and Reggie Rector, Appraiser, are presented in the following pages. Bob will be the main point of contact for this contract. He will be responsible for signing all appraisals on behalf of CEI. Should additional appraisers be needed to support Mr. Helmandollar, we will send to ADOT, in writing, request for their addition to the contract and await approval.

CEI's office is headquartered in Phoenix and is organized by the following chart:





APPRAISAL SERVICES AND REAL ESTATE CONSULTING

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Staff Qualifications

ROBERT HELMANDOLLAR — LEAD APPRAISAL AGENT / PROJECT MANAGER

Arizona Certified General Real Estate Appraiser (No. 30403) / Arizona Real Estate Broker (No. SE5040205000)

SUMMARY

Mr. Helmandollar is CEI's Right of Way Department Manager and a former ADOT Chief Right of Way Agent. He is licensed in the State of Arizona as a General Real Estate Appraiser and Real Estate Broker. As an ADOT Chief Right of Way Agent, he oversaw a staff of 148 budget positions, an operations budget in excess of \$5 million and right of way purchases of over 800 parcels per year at a cost of up to \$150 million within a fiscal year. His expertise includes appraisals and appraisal review, acquisition, relocation, administration and project management.

Areas of Expertise

Project Management
Appraisals / Appraisal
Review
Right of Way
Acquisition
Relocation
Administration

Mr. Helmandollar served as Chief Right of Way Agent for the Arizona Department of Transportation (ADOT) responsible for the direction of appraisals, relocation, acquisition and property management and condemnation sections. His experience has included appraising all types of properties for acquisition including full and partial takings, reviewing contract appraisals for consistency and conformance with accepted standards and giving final approval of valuations for acquisition.

Mr. Helmandollar is a past president of the Arizona Chapter of the American Society of Appraisers and is a past director. He is a licensed General Real Estate Appraiser and a member of the International Right of Way Association (IRWA). He has conducted over 20 appraisal courses as an instructor for the IRWA.

After retiring from ADOT, Mr. Helmandollar worked as a real estate consultant on numerous airport projects including Northwest Arkansas Regional Airport in Bentonville, Arkansas performing appraisals and property management services; Lambert-St. Louis International Airport in St. Louis, Missouri performing acquisition and relocation services; and the Seattle-Tacoma International Airport in Seattle/Tacoma, Washington performing a relocation study for the third runway. Mr. Helmandollar has performed appraisal, acquisition and relocation services for numerous Federal Aviation Administration (FAA) sponsored projects and is very familiar with and understands the FAA acquisition guidelines.

EDUCATION

BS Business Administration, Arizona State University

Highway Transportation Management Institute, University of Mississippi

American Institute of Real Estate Appraisers: Appraisal Courses and Review, Arizona State University

REFERENCES

City of Sedona Property Appraisals

Mr. Charles Mosely, City of Sedona Public Works Director

928-204-7132



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BOB HELMANDOLLAR (CONTINUED)

Right of Way Valuations – Highway Widening & Realignment – Kentucky
Mr. Phil Gravemeyer, Kentucky Transportation Cabinet, Right of Way Supervisor
502-459-8402

2002 – 2003	Highway 27, Campbell County	38 Parcels
2002 – 2003	Highway 127, Owen County	30 Parcels
2001 – 2002	Highway 11, Bath County / Fleming County	36 Parcels
2000 – 2001	Highway 27, Whitley County	40 Parcels
2000 – 2002	Highway 165, Robertson County	32 Parcels
1999 – 2000	Highway 11, Fleming County	24 Parcels
1998 – 1999	Gallatin County, Highway 35	16 Parcels
1998 – 2000	Winchester Bypass – Clark County	38 Parcels

EMPLOYMENT HISTORY

2003 – Present	Chief R/W Agent / Vice President	Consultant Engineering, Inc.
1997 – 2003	Project Manager	Presnell Associates, Inc. Kentucky Transportation Cabinet
1994 – 1997	Project Manager	O.R. Colan and Associates St. Louis Lambert Field NW Arkansas Regional Airport Authority SeaTac International Airport

1988 – 1994 Chief Right of Way Agent ADOT
Mr. Helmandollar was responsible for the supervision of the Right of Way Department. He provided direct supervision of the review appraisers and final approval of appraisals and settlements of purchase agreements.

1985 – 1988 Deputy Chief Right of Way Agent ADOT
Mr. Helmandollar was responsible for the supervision of appraisal, acquisition, relocation condemnation and property management sections at ADOT. He had approval authority for appraisals and concurred on valuations of expensive properties.

1983 – 1985 Chief Appraiser ADOT
Mr. Helmandollar was responsible for managing the appraisal office and assigned work to the staff appraisers as well as monitoring their activities. In addition, he selected and assigned work to fee contract appraisers.

1976 – 1983 Review Appraiser ADOT
Mr. Helmandollar was responsible for reviewing, approving and disapproving staff and fee. He prepared appraisals and determinations of value on projects throughout the State.

1969 – 1976 Staff Appraiser ADOT
Right of Way Appraisals for I-10 Improved Properties
New Alignment on US 60
Kingman, Williams Bypass on I-40, 400 – 500 Parcels
Interchange Improvements on I-17
New Alignment for the Tucson / Nogales I-19



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REGINALD RECTOR — RESIDENTIAL APPRAISAL AGENT

Arizona Certified Residential Real Estate Appraiser (No. 20124) / Arizona Real Estate Broker (No. BR030250000)

SUMMARY

Over the past 21 years, Mr. Rector has been involved in the appraisal and sale of real property in Arizona as well as right of way acquisition and relocation. This experience has been gained as an employee of a consulting firm, a lending institution, an independent appraisal firm and a real estate sales office. In all positions, he was involved in both field and office assignments independently as well as with other staff members. Mr. Rector has more than 13 years experience as an **independent fee residential appraiser** and additionally served for over two and one-half years as **chief appraiser** in the Phoenix office of a national lending institution.

Mr. Rector has done numerous property appraisals including two that had values up to \$1 million. While with CEI, Reggie has performed appraisals for residential and residential income properties as well as some properties that were commercial and industrial. Mr. Rector also has experience performing appraisals for vacant land-acreage, vacant land residential lots, improved commercial property and mobile homes. He has completed appraisals using the Fannie Mae Form and Complete Appraisal Summary Reports.

In addition to his appraisal experience, over the last two years, Mr. Rector has acquired over \$3.8 million in commercial properties for right of way projects. He relocated more than 20 operating businesses having over \$600,000 in relocation benefits in the same time frame. Ten of these businesses were in the automotive industry. Specialty businesses relocated included a propane gas company, an electronic surveillance company, an ice cream distributor/warehouse and an industrial electric motor manufacturer.

Areas of Expertise

Real Property Appraisals

Research on Ownership, Land Use, Zoning, Flood Plain Status

Right of Way Acquisition and Relocation

Title Report, Plans, Blueprints and Legal Description Review

Purchase Agreements and Escrow Accounts

New Housing and Property Locations

Property Inspections

EDUCATION

Real Estate Principles – Rio Salado Community College

Appraisal Principles – University of San Diego

Appraisal Procedures – Arizona State University

Uniform Standards of Professional Practice – Arizona School of Real Estate

Engineering Plan Development and Application – International Right of Way Association

USPAP Update

Arizona Appraisal Law / Appraising Income Properties / Appraisal Review Process

EMPLOYMENT HISTORY

6/02 – Present	Right of Way Agent (Licensed)	Consultant Engineering, Inc.
4/02 – 6/02	Right of Way Field Agent	Universal Field Services
3/00 – 4/02	Right of Way Agent (Licensed)	Consultant Engineering, Inc.
1/97 – 8/99	Chief Appraiser — Arizona	Pacific Thrift & Loan
2/83 – 12/96	Residential Real Estate Appraiser	Denis, Rainsford and Wright, Inc.
4/88 – 2/03	Real Estate Agent	Art Fortune Realtors



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STATE OF ARIZONA

BOARD OF APPRAISAL

BE IT KNOWN THAT

REGINALD G. RECTOR

HAS MET ALL THE REQUIREMENTS AS A

Certified Residential Real Estate Appraiser

In accordance with Arizona Revised Statutes and on authority of the Board of Appraisal, State of Arizona.

This certificate shall remain evidence thereof unless or until the same is suspended, revoked or expires in accordance with the provisions of law.

CERTIFICATE NUMBER
20124

EXPIRATION DATE
AUGUST 31, 2006

In witness whereof the Arizona Board of Appraisal caused to be signed by the Chair of the Board and the Executive Director

[Signature] Chair of the Board
8/13/04 Date

[Signature] Executive Director of the Board of Appraisal
8/13/04 Date

SHALL REMAIN PROPERTY OF ARIZONA BOARD OF APPRAISAL



Relevant Project Experience

CEI's team of right of way agents have completed many projects throughout the State of Arizona. CEI agents have provided right of way appraisals, planning, acquisition, relocation, survey and plan production services.

Presented below is a combination of CEI's experience with Mr. Helmandollar as the Lead Appraiser, and his prior appraisal experience with other firms. We have denoted which projects are his prior to joining CEI.

While with ADOT, Mr. Robert Helmandollar, a former ADOT Chief Right of Way Agent, has been the Lead Appraiser on CEI's recent appraisal contracts Bob was key component to ADOT Right of Way Group from 1969 through 1994. He was integral during Arizona's highway infrastructure planning "boom" in the 1980's and 1990's. Bob helped establish the precedent for many of ADOT Right of Way policies that are still in place today. Mr. Helmandollar's experience with ADOT, combined with his experience as a consultant in right of way work over the past 10 years greatly benefits ADOT, ADOA, State agencies, and local jurisdictions who will utilize this contract.

CITY OF YUMA 40TH STREET SANITARY SEWER LINE INTERCEPTOR (PHASES I & II).

CEI provided right of way services for the City of Yuma Public Works Department on a large sewer line project. CEI represented the client in negotiations and acquiring rights of entry, temporary easements, permanent easements and fee titles from private property owners for new sewer line installation and future roadway construction. CEI is also responsible for preparing documents, obtaining and notarizing signatures, obtaining releases of liens, opening escrows with title companies, and processing claims for payment. Mr. Helmandollar prepared market analysis and valuation documents on 29 parcels for fee and easement acquisitions. CEI is on an on-call contract with the City to provide right of way services.

City of Yuma
Mr. Ish Castro, Real Property Agent
928-373-4525
05-04 through 01/05

CITY OF SEDONA APPRAISALS

In June 2004, CEI prepared appraisals on City of Sedona properties for a land exchange with the Arizona Water Company. The Arizona Water Company intended to purchase City-owned land adjacent to their well site for expansion. Mr. Helmandollar performed an appraisal on the City-owned property and the Arizona Water Company property by considering their physical characteristics, their highest and best use and trends affecting the values. In determining the most accurate values, Mr. Helmandollar performed a direct sales comparison from current market data. Mr. Helmandollar prepared appraisals on seven parcels for a sewer expansion project in 2005. CEI is on an on-call contract with the City to provide right of way services.

City of Sedona Department of Public Works
Mr. Charles P. Mosley, PE
928-204-7132
06/04 through 07/04



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WILLIAMS GATEWAY AIRPORT, PARCELS APN 304-32-27E AND 304-30-020D RAY ROAD

Provided land appraisal services and report preparation for Parcels APN #304-30-37E and 304-30-020D. Appraisals to consist of 2 options: value of the property without the proposed Ray Road Extension and value of the property with the proposed Ray Road extension. CEI has a one-year on-call contract with WGA for one year with options to extend.

Williams Gateway Airport
Mr. Mike Williams
480-988-7600
04/05 (on-call) Task 1 (above) 05/05 through 06/05

SRP SUBSTATION SITE APPRAISAL

CEI is currently appraising an easement for a future substation site for SRP on Williams Field Road and Ellsworth Road in Mesa.

SRP
Mr. Mark Keller, Project Manager
602-236-5900
08/05 through 09/05

ADOT URBAN FREEWAY CORRIDORS (Mr. Helmandollar's experience prior to joining CEI)

In the 1970's Mr. Helmandollar played an integral role in the appraisal of properties for many of the Valley's new freeway corridors. As a Review Appraiser and Appraisal Manager with ADOT, Mr. Helmandollar valued residential, commercial and agricultural properties in the SR 51, Loop 101, Loop 202, US 60 Superstition and Grand Avenue. In the East Valley, Mr. Helmandollar valued many properties on the US 60 Superstition Corridor from the I-10/US 60 Transition east to Apache Junction. Most property appraisals were that of agricultural farmland and residential dwellings.

NORTHWEST ARKANSAS REGIONAL AIRPORT, BENTONVILLE, ARKANSAS (Mr. HELMANDOLLAR'S EXPERIENCE PRIOR TO JOINING CEI)

Over a 2-year period, prior to construction of this new airport, extensive property management and **appraisal services** were conducted for this new regional airport. This turn-key airport site was constructed in a rural area of the Bentonville, Arkansas area and the Northwest Arkansas Regional Airport Authority consisted of many cities and counties in the area, such as Bentonville, Rogers, Springdale and Fayetteville. All the appraisal work was closely monitored by the FAA audited. Various types of reports were prepared for the appraised properties, such as Before and After Reports and complete Narrative Appraisals for the commercial (farming operations) properties. All reports were prepared for the eventuality of eminent domain, which in some cases were necessary. Types of properties appraised included agricultural/farm land, ranches (dairy, chicken, cattle) single family residences, mobile homes and special purpose buildings (churches).

NWARA.
Mr. Scott Van Laningham
One Airport Blvd., Ste. 100
Bentonville, AR 72712
479-205-1000 ext. 2228
1994 – 1995 (12 months)



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Approach to Appraisals

Mr. Helmandollar will approach the appraisals on these projects in a manner that is discussed below and illustrated in the flow chart on the following page. The approach to appraisals is somewhat systematic; however, the experience of Mr. Helmandollar (and support staff) will make this process run smoothly, and ADOT can be rest-assured that the appraisals of the properties will be handled with the utmost professionalism.

We understand the many activities required for a successful real estate appraisal. This process must be documented well and adhered to, thus, ensuring thorough and accurate completion of assignments. The activities integral to property appraisals are very important with respect to the larger picture with Arizona State agencies. Each property will be approached on a case-by-case basis so the property owners will have a fair valuation of their property. The appraisals will be requested in several different formats including Fannie Mae Form Report, Limited Appraisal Summary Report, Complete Appraisal Summary Report, Complete Appraisal Summary Report with before and after values and right of way acquisition with damage estimates and appraisal assignments that require a land use planner or other experts to update appraisals for eminent domain proceedings.

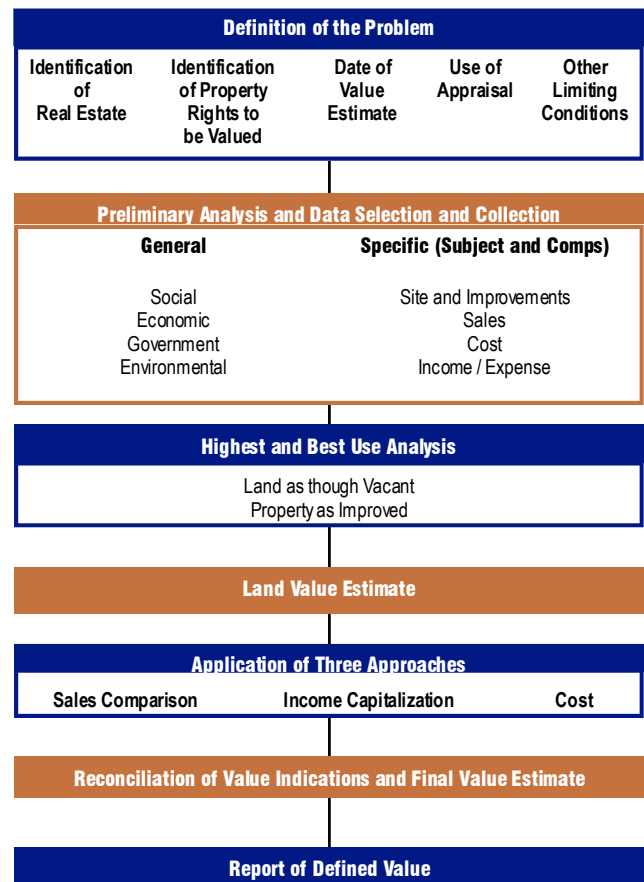
Define the Appraisal Property. The initial step in appraising property is the identification of the real estate to be valued and the property rights of the owner. Surrounding property values will be taken into consideration in the final appraisal estimate and other limiting conditions.

Preliminary Analysis and Data Collection. Each property will go through a preliminary data collection phase that includes general and specific data. This will require research time but will be conducted in a time-efficient manner.

In order to eliminate project influence, comparable sales data will be collected from similar neighborhoods and not specifically the immediate area of the subject properties.

Highest and Best Use Analysis. In the valuation process, two main items are taken into the consideration when determining the highest and best use estimate. The property is valued as though it is vacant or as it has been improved.

THE VALUATION PROCESS





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Land Value Estimate. Valuating the land estimate has a more detailed approach. Various procedures take place, such as a sales comparison approach; allocation procedures, development procedures, land residual procedures, extraction procedure and capitalization of ground rent.

Application of Approaches. There are three main approaches an appraiser takes when valuating the cost of properties — Sales Comparison, Income Capitalization and Cost.

The **Sales Comparison Approach** is a value indication for a property that is derived through comparison with sale prices of similar properties. Items taken into consideration include: financing terms, conditions of sale, market conditions (time), location, physical characteristics and income characteristics.

The **Income Capitalization Approach** analyzes the present value of the future benefits of property ownership, considering items such as income, resale and reversion, and before- and-after-tax viewpoints. (Usually not applicable to single family residences.)

The third is **Cost Approach**, which reflects marketing thinking by recognizing that market participants relate value to cost. Two items are researched — land value and improvement value (cost new less depreciation). The latter includes current reproduction costs and current replacement costs. This approach is considered less reliable than the Sales Comparison Approach and is generally applicable when sales data is lacking.

Reconciliations of Value Indications. This is the final analytical step in the valuation process. The appraiser reconciles the indications of value derived in the separate approaches into a single dollar figure or a range in which the value will most likely fall.

Report of Decided Value. The process is complete when the appraiser provides the conclusion of the property value in a report.

Eminent Domain Property Acquisitions / Expert Witness Testimony

Mr. Helmandollar is very familiar with Eminent Domain Property Acquisitions. As an ADOT employee, and working as a consultant for the Kentucky DOT, the City of St. Louis, the Northwest Arkansas Airport Authority and SeaTac Port Authority, he is very familiar performing appraisal services for public agencies. For many of the properties Bob appraised, he worked closely with the Agencies' Condemning Authorities and their attorneys. He helped them prepare for court cases and presentations. He also has a great deal of experience in giving deposition and testimony.

The Uniform Standards for Professional Appraisal Practices (USPAP)

Mr. Helmandollar and staff certified staff appraisers are familiar with the Uniform Standards for Professional Appraisal Practices (USPAP). Upon their annual renewal of their Arizona Appraisal Certifications, they attend "refresher" courses as required by the Appraisal Foundation and the Appraisal Standards Board (ASB).



9. Category 1 Real Property Appraisal Services

Work Samples – Submitted Under Separate Cover

Understanding the Requirements

CEI has read through and understands the Contractor's Responsibilities in the Request for Proposal Scope of Work. We will meet with the State Agency's representative for specific assignment responsibilities once selected for a work order.

In summary, CEI and Mr. Helmandollar understands our responsibilities for Category 1 (Real Property Appraisal Services) to included but not be limited to the following as it relates to a specified parcel of property.

- Initiate contact with property owners to schedule property inspection in accordance with the State Agency's Policies and Procedures.
- Mr. Helmandollar will perform assignments in accordance with the current Federal laws, Arizona statutes and Arizona Board of Appraisal rules related to USPAP.
- Follow accepted principles and techniques in valuation of real and personal property in accordance with existing laws.
- Mr. Helmandollar will perform appraisal work for the State Agency. He will physically inspect each subject property appraised and all comparable properties utilized in completing the appraisal assignment. Other staff members of CEI may provide significant assistance in the areas of research, inspections, preparation of exhibits and acting as the appraiser's assistant. Credit for the assistant's contributions must be given in the report. However, the analysis and value conclusions must be those of the Appraiser. As such, only Mr. Helmandollar, the Appraiser, may sign the appraisal report and the Certificate of Appraiser.
- The State Agency shall establish the report format and shall have final approval for the report content and submission deadline for progress and/or final reports. Unless otherwise specified, CEI will prepare each appraisal report in a narrative Self-Contained Appraisal Report format.
- Electronic files, as well as final reports, will be submitted if requested by the Agencies.
- Changes to the report format, content, and/or frequency shall require approval by the State Agency's Representative.
- Reports will be complete, including a copy of the plat or plan sheet, ownership record sheet identifying the parcel appraised and all other required documentation and supporting data.



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- CEI will perform an in-house quality review of the appraisal (including all mathematical computations, and grammar and valuation methodology) prior to submitting the report to the State.
- CEI will deliver the report to the State Agency on the date and time mutually agreed upon. Failure to deliver the report on the agreed upon due date shall result in the assessment of liquidated damages as reimbursement for the State's administrative costs of the delay in the amount of \$100.00 per report for each business day beyond the due date, excluding state holidays.
- CEI will correct any errors and/or furnish any omitted required documentation as determined by the State or its authorized representative at no additional cost to the State within five (5) business days of notification. Failure to deliver corrected documentation to the State or its authorized representative within; the time frame shall result in the assessment of liquidated damages as mentioned above.
- CEI will make revisions as requested by the State resulting from changes in construction and/or right of way plans.
- CEI may provide expert witness services, including appraisal update, pre-trial and trial conferences, depositions, and court testimony, in connection with the State's acquisition of the property. Upon expiration of the contract, there shall be no new work assignment. However, the contract shall remain in effect and continue to be extended for the services authorized by this clause until all parcels are acquired.
- Mr. Helmandollar will ensure that he maintains current certification status as an Arizona Certified General Real Estate Appraiser throughout the term of the contract.
- CEI will perform work in a responsible and professional manner in accordance with the requirements incorporated in the appraisal assignment.
- CEI will contact the State Agency's Representative immediately if the appraisal needs to be revised and/or updated due to factors beyond the CEI's control.



10. Category 3 Appraiser Reviewer

Work Samples – Submitted Under Separate Cover

Understanding the Requirements

In summary, CEI and Mr. Helmandollar understands our responsibilities for Category 3 (Appraiser Review Services) to include but not be limited to the following as it relates to a specified parcel of property.

- Mr. Helmandollar will conduct a technical review of the appraisals in accordance with USPAP Standards for the purpose of developing an opinion as to whether the analyses, opinions, and conclusions in the work under review are appropriate and reasonable, and developing the reasons for any disagreement.
- Mr. Helmandollar will provide expert witness services, including appraisal update, pre-trial and trial conferences, depositions, and court testimony, in connection with the State's acquisition of the property. Upon expiration of the contract, there shall be no new work assignment. However, the contract shall remain in effect and continue to be extended for the services authorized by this clause until all parcels are acquired.
- Mr. Helmandollar will ensure that he maintains current certification status as an Arizona Certified General Real Estate Appraiser throughout the term of the contract.
- Mr. Helmandollar will perform assignments in accordance with the current Federal laws, Arizona statutes and Arizona Board of Appraisal rules related to USPAP.
- Electronic files, as well as final reports, will be submitted if requested by the Agencies.
- Changes to the report format, content, and/or frequency shall require approval by the State Agency's Representative.
- The State Agency shall establish the level of review and shall have final approval for the report content and submission deadline for progress and/or final reports. It is the State's intention to contract out appraisal review assignments requiring an analysis employed under **Levels 5, 6, and 7.**
- As part of a review assignment, CEI will develop a report and a separate opinion of value if requested by the State Agency.

SEVEN LEVELS OF ANALYSIS
(11th Addition for The Appraisal of Real Estate)

- Level 1. The report is merely scanned
- Level 2. The mathematical calculations are checked and the date is examined for its reasonableness.
- Level 3. Selected pertinent sections of the report are read.
- Level 4. The appraisal is checked to ascertain that the methodology is appropriate.
- Level 5. The entire report is read thoroughly.
- Level 6. Limited confirmation of market data is attempted.
- Level 7. Full confirmation of market data is attempted.



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- Mr. Helmandollar only will review work for a State Agency. Appraisal reviews may be completed without a field inspection of the subject property. Upon the request of the State Agency, Mr. Helmandollar will inspect the subject property appraised and all comparable properties utilized in completing the appraisal assignment. Other staff members of CEI may provide significant assistance in the areas of research, inspections, preparation of exhibits, and acting as the appraiser's assistant. Credit for the assistant's contributions must be given. However, the analysis and/or value conclusions (if requested) must be those of the Mr. Helmandollar. Only Mr. Helmandollar may sign the appraisal review and the Certification.
- If Mr. Helmandollar is required to make corrections, he will review the revised appraisal and deliver the appraisal review report to the State Agency on the time and date specified.
- Mr. Helmandollar will provide written justification to the State Agency if additional time is necessary to complete the appraisal review. Additional time will be considered only if appraisal corrections caused a delay in the review process.
- Mr. Helmandollar will perform a quality review of the report (including all mathematical computations, grammar, and valuation methodology) prior to submitting the report to the State Agency.
- Mr. Helmandollar will deliver the report to the State Agency on the date and time mutually agreed upon. Failure to deliver the report on the agreed upon due date shall result in the assessment of liquidated damages as reimbursement for the State's administrative costs of the delay in the amount of \$100.00 per report for each business day beyond the due date, excluding state holidays.
- Mr. Helmandollar will correct any errors and/or furnish any omitted required documentation as determined by the State or its authorized representative at no additional cost to the State within five (5) business days of notification. Failure to deliver corrected documentation to the State or its authorized representative within; the time frame shall result in the assessment of liquidated damages as reimbursement for the State's administrative costs of the delay in the amount of \$100.00 per report for each business day beyond the due date, excluding state holidays.
- Mr. Helmandollar will make revisions as requested by the State resulting from changes in construction and/or right of way plans. Revisions may also include the addition or deletion of parcels.
- Mr. Helmandollar will complete the work in a responsible and professional manner in accordance with the requirements incorporated in the appraisal review assignment. Determination of acceptability of work will be made by the State Agency. Should Mr. Helmandollar fail to successfully perform any of the required tasks, provide an insufficient level of information, commit errors of any nature, and/or omit necessary documentation, Mr. Helmandollar and CEI agrees to correct deficiencies and errors, as well as furnish the required documentation at no additional costs to the State Agency.